Ooma
PARTNER PROGRAM
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Ooma Enterprise

Financial Services Technology

USE CASE

Financial Technology Firm efficiently serves 400+ brands with flexible UCaaS and Call Center solutions.

The Challenge

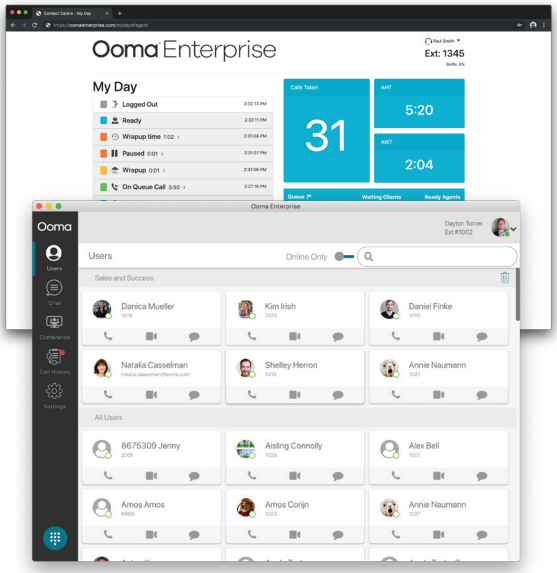
Technology companies that support financial transactions for businesses require flexible, customizable communications. Whether they are supporting ecommerce or brick-and-mortar retail purchases, they want to be able to tailer their communications to meet specific customer needs.

In this use case, one major financial services technology company needed PCI certification, call center capabilities that support remote agents, reporting, and disaster recovery failover. The Ooma Enterprise solution and customer success team provided these features and delivered a tailored communications system that delivered a better customer experience and greater business value.

Customized call flows support remote agents representing 400+ brands.

The company needed to create one call flow structure that was perfectly tailored to meet the needs of all their multi-layer marketing brands (400+ companies). Numerous challenges were solved using the Ooma Enterprise call center, from standardizing the desired call handling process to accurately representing each client's brand when answering each call.

My Day agent and manager dashboards



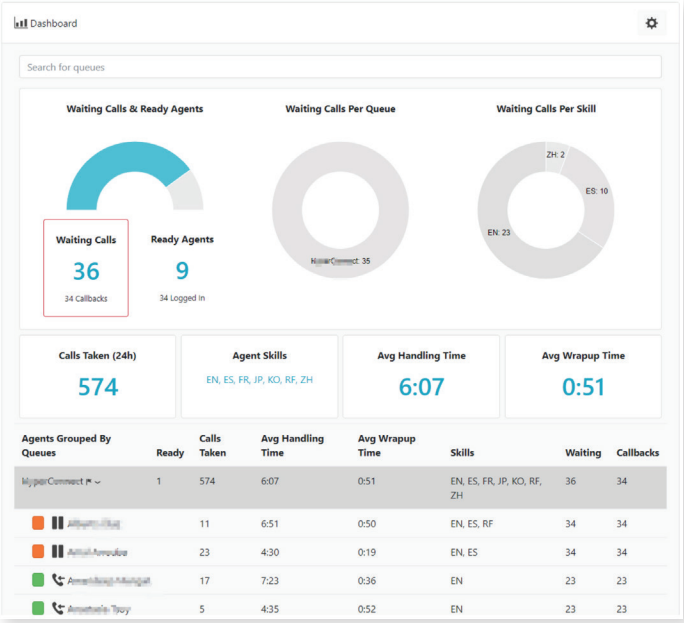
Desktop Client

The Solution

A customized UCaaS / Call Center system perfectly tailored to enable the following:

- Calls are routed based on agents' skills and languages for each key brand.
- PCI security and certification (for credit card processing).
- Call center dashboards provide real-time view of agent activity.
- Managers can see real-time reporting across brands, queue activity, agent status and activity.
- Best practices can be realized and standardized.
- Agents can view and optimize their daily performance.

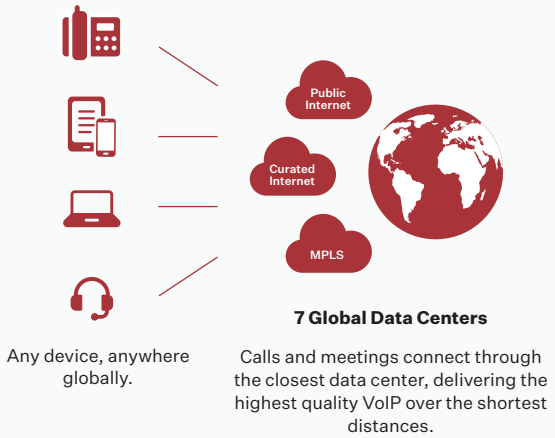
New management and agent dashboards provide real-time insights.



Ooma developed the MyDay dashboard to enable call center managers to see both real-time and historic performance across all agents within the call center. Agents can also see their own views and summaries of their daily activities.

Ooma Enterprise

The Ooma Network Architecture Difference



UCaaS tailored to support your business model and customer needs.

Ooma Success Heroes make IT professionals' lives easier by delivering solutions that are a perfect fit for your organization. Heroes are fully accountable and provide service that's second to none.

How Ooma Delivers Business Value to Fin Tech Companies and their Customers.

Ooma Enterprise provides superior VoIP, call routing and call center services to FinTech companies that support many different brands. Fast-growing, fast-moving companies love the added flexibility and agility they receive with these capabilities:

- Highest quality VoIP
- Conferencing – audio, video, web, rooms
- Call Center
- Drag & Drop IVR menu builder
- APIs and integration extensibility
- PCI security
- Door entry systems
- Paging
- Cordless DECT
- 99.999 % uptime and SLAs

Unique technology infrastructure delivers superior call quality.

Ooma delivers superior call quality, resilience, security, and compliance because we have invested in data centers around the world to support clarity in global calls and communications. Other UCaaS providers might provide presence around the globe; however, all call connections are driven through one location, which creates great vulnerabilities in call clarity. We can easily create rules that isolate where data is stored to satisfy GDPR and other specific protocols.

Best UCaaS Value.

Ooma provides the best VoIP call quality and reliability because of our unique network of 7 data centers. Unlike most UCaaS providers that route calls through one key data center that could be half way across the world, Ooma routes each call to the closest data center. Shorter distances deliver the best call quality with no delays. Ooma partners with many carriers to provide the greatest value to its customers, along with the ability to instantly provision local numbers in 100+ countries. And, Ooma IP phones are automatically self-provisioned for fast and easy set up.

Ooma serves diverse customers in a wide range of industries, including:

slack · TRACTION on Demand · Optimizely · Zappos.com · Wendy's

Request a free consultation and personalized quote today.